



Board of
Examiners

September 2006

Update

2006 Award Applications Received and Forwarded to Stage 3, Site Visit

A total of 76 organizations have applied for the 2006 Malcolm Baldrige National Quality Award (MBNQA). Three manufacturing companies, four service companies, eight small businesses, 16 education organizations, and 45 health care organizations sent in applications by the May 25 deadline. These applications were reviewed as part of the Stage 1, Independent Review process.

In addition, ten organizations applied as participants in a pilot for the nonprofit category, which will become a full-fledged Award category in 2007. The pilot is an opportunity for the Baldrige National Quality Program (BNQP) to ensure that the Criteria for Performance Excellence are relevant to the nonprofit community, as well as an opportunity to test potential changes to the evaluation process for all Award categories in 2007 and beyond.

On July 27, the MBNQA Panel of Judges reviewed data on the Stage 1 scoring of these applications and selected 39 organizations to send to Stage 2, Consensus Review. Two manufacturing companies, two service companies, three small businesses, ten education organizations, and 22 health care organizations were assessed by a team of Examiners in order to come to consensus on their applications. In addition, as part of the nonprofit pilot, all nonprofit applicants received consensus review.

On September 14, the MBNQA Panel of Judges reviewed data on the Stage 2 scoring of these applications and selected 15 organizations to send to Stage 3, Site Visit. One service company, three small businesses, three education organizations, six health care organizations, and two nonprofit organizations will be site visited by teams of Examiners. No manufacturers were selected. Health care site visits will occur October 15–21, and all other site visits will occur October 22–28.

The Judges will meet next on November 13–17, 2006, to determine which of these organizations will be recommended to the Secretary of Commerce Carlos Gutierrez as Award recipients. Award recipients will be announced by the Secretary in late 2006.

New Overseers Appointed

The Board of Overseers, which is appointed by the Secretary of Commerce, makes recommendations to the Secretary and to the Director of the National Institute of Standards and Technology (NIST) regarding changes and improvements to the Baldrige Program. Four new Overseers have joined the board, effective June 2006.

Gayle Capozzalo is Executive Vice President, Strategy and Systems Development, at the Yale New Haven Health System (YNHHS) in New Haven, Connecticut. Gayle has responsibility for leading and directing YNHHS's development and growth, including clinical and operational integration, strategy and performance management, and ambulatory services. Additionally, she is responsible for advising and working with the hospital's leadership to enhance operational and clinical performance.

Prior to joining YNHHS in 1997, Gayle was Senior Vice President for Organizational Development with the Sisters of Charity of the Incarnate Word Health Care System in Houston, Texas. Previously, she held senior positions with the SSM Health Care System (the first Baldrige Award recipient in health care) in St. Louis, Missouri. Gayle is a Connecticut Regent of the American College of Healthcare Executives.

Elizabeth Hale is President of the Institute for Education Leadership (IEL) in Washington, D.C. IEL's efforts are directed at creating and working through action and learning networks to improve outcomes for children and youth, including, but not limited to, various leadership development activities, such as Education Policy Fellowship, Superintendents Prepared, and Collaborative Leaders Programs.

Betty has been a leader at IEL for more than 20 years, and her previous professional experiences include serving as an education budget analyst in the Governor's Office, State of Illinois, and as a manager of Head Start programs at both the federal and state levels. Betty began her career as a teacher, which included overseas experience with the

Department of Defense's school system. She is the 2005 recipient of the Harvard Graduate School of Education's Alumni Council Award for Outstanding Contributions to Education.

Lawrence Katz is the owner of Dot's Diner restaurants, with six locations in Jefferson and St. Charles Parish, Louisiana. He currently serves as a board member of the U.S. Tourism and Travel Advisory Board.

An active member of his community, Larry is a founding charter member of the Jefferson Chamber of Commerce, a member of the Alliance for Good Government (Jefferson chapter), and an East Jefferson Hospital Foundation board member. Additionally, he worked for more than ten years to help create a Louisiana Tuition Trust Authority to assist middle-class families in their efforts to save money to pay for their children's college education. He is past chairman of the East Jefferson Chamber of Commerce, New Orleans and River Region.

Michael Langridge is the Program Director for the Iowa Quality Center, where he coordinates all activities for the state's Baldrige-based assessment and award processes. In that role, Mike recruits organizations willing to use the Criteria and performance excellence framework, and maintains the Examiners' and Judges' programs for the state of Iowa. Prior to joining the Iowa program in 2001, Mike worked for Cargill, Inc., for 30 years; in his final 10 years with Cargill, he was the Division Director of Total Quality Management.

Mike is an active member in the Alliance for Performance Excellence, a network of national, state, and local Baldrige-based programs that help organizations achieve performance excellence using the Baldrige Criteria. He was a Baldrige Examiner for three years, two of which were in the role of Senior Examiner.

The new Overseers join the current board: George Benson, John Friel, Lynn Harker, Fred Palensky, Aubrey Stephenson, and Michael Wood.

New Judge Appointed

In addition to the new Overseers, Secretary Gutierrez recently appointed one additional member to the 2006 MBNQA Panel of Judges.

Michael Hughes has been President of the United Way of South Hampton Roads (UWSHR) in Norfolk, Virginia, since 1992, overseeing and orchestrating all operations in the organization's six-city region in southeast Virginia. His primary responsibilities include raising annual operating funds for 69 voluntary, health, rehabilitation, and character-building agencies in the region. In addition, Mike leads UWSHR in bringing businesses, government, schools, health care organizations, and social services together as partners through efforts such as Success by 6 and Young Leaders Society. Mike began his United Way career in 1973.

Mike joined the current panel—Lloyd Barker, David Branch, Jim Evans, Paula Friedman, Steve Hagedorn, Steve Lampa, Bo McBee, Diane Siri, and Maureen Travalini—for its first meeting of the 2006 Award cycle in June.

Baldrige Program Considers Name Change

With the addition of the nonprofit category to the Award competition in 2007 and the evolving nature of the Baldrige Criteria to a comprehensive organizational management framework, the Baldrige Program is considering changing the "Malcolm Baldrige National Quality Award" to a name that better reflects the Award's and Program's current focus on performance excellence. One proposal is to change the name to the "Malcolm Baldrige National Excellence Award," with a tagline to define excellence. The Baldrige Program, which would change its name to match the Award, will be undertaking a branding study to seek your input and assess the impact of a new name.

The Program has been thinking about the name change for some time to align the name with changes to the Criteria and the field of performance excellence. Feedback, especially from the manufacturing community, has been that the term "quality" is misunderstood and, to many, is interpreted as a 1980s concept. As it has evolved, BNQP is more focused on overall organizational excellence. Any name change must be sensitive to

Update

the needs of all Award sectors and must keep the concept of the Award as representing the “best in the nation” and role model. Once a name is proposed, it must be approved by Congress.

If you have thoughts about a new name, please contact Sandra Byrne at sandra.byrne@nist.gov or at (301) 975-4812.

Just-in-Time Training Materials for Site Visit Now Available

Examiners participating in Stage 3, Site Visit Review can learn about the process and their roles by reviewing the just-in-time training materials on the Baldrige Web site at www.baldrige.nist.gov/Examiner_Resources.htm. This year, the Site Visit Manual will include hyperlinks to various sections/topics for ease of use.

2006 Examiner Training Focuses on Linkages

Examiner training returned to NIST in May 2006, with 560 Examiners completing the training and now serving as members of the 2006 Board of Examiners. The Examiner Preparation Course saw some changes with the introduction of a Roadmap Mural, drawn by BNQP’s own Pat Hilton. The mural gave a graphical description of the course curriculum and was very well received by Examiners.

Training focused on the importance of linking key factors to Criteria Items and developing well-written key themes. Senior and Alumni Examiners played a larger role in training by facilitating portions of the consensus, site visit, and key themes modules. A new role called the process champion also was introduced to stimulate more focused discussion during table exercises.

Examiner Application Available in November 2006

Preparations are underway for the opening of the online Examiner Application on November 7, 2006. Returning Examiners and previous applicants will be sent separate e-mails containing their personal identification numbers (PINs) and passwords to access the system.

The online application will open November 7, 2006, and will close at midnight on January 8, 2007. Notification of selection decisions will be sent via overnight mail on March 27, 2007.

BNQP requests that all Examiners update their contact information, if appropriate, by October 13, 2006, to ensure they receive their PINs and passwords in time. Please call Suzana Weaver at (301) 975-4219 or e-mail suzana.weaver@nist.gov to update your contact information.

Alumni Program Changes in 2007

With the increase in Award applications in recent years and the continued loyalty of the Baldrige Alumni, the Baldrige Program is making changes to its Alumni Program to accommodate an increase in the number of Alumni Examiners appointed to the 2007 Board of Examiners.

Alumni will continue to serve in a “reserve pool” of Examiners, who will be assigned, as needed, to Consensus and/or Site Visit Teams as members, Backup Team Leaders, or Team Leaders. Alumni also may be asked to serve as mentors for new Examiners.

The application process for Alumni will change this year. Alumni, like returning Examiners, will have the opportunity to update their existing application by going to www.baldrige.nist.gov/Examiner_Application.htm and clicking on returning Examiner. Alumni who have served in the past three years (2004–2006) will receive e-mails with links and instructions on how to access and update their information, including separate e-mails containing PINs and passwords. Alumni who have not served in the past three years can send an e-mail to examappl@nist.gov or call the Examiner Hotline at (877) 237-9064 and request a PIN and password.

All Alumni appointed to the 2007 Board of Examiners will be invited to attend Senior Examiner Training. Attendance at Senior Examiner Training is a prerequisite for (but not a guarantee of) consideration as a Backup Team Leader or Team Leader for Consensus and Site Visit Teams.

Baldrige Collaborative Seeking Input for Schools of Business

The Baldrige Collaborative (composed of representatives of the Baldrige Program, ASQ, the Baldrige Foundation, and the Baldrige State Alliance) is developing a list of resources for schools of business that might be interested in beginning or enhancing coursework related to Baldrige. Therefore, the collaborative is gathering information on Baldrige-focused courses being taught at business schools nationwide.

Please let us know if you are currently teaching a course(s) or are aware of a course(s) being taught on the topic in a business school. There is no need to send copies of curricula or syllabi at this time—the collaborative's current interest is in learning what exists. Please send this information to sandra.byrne@nist.gov.

2006 Workshop Held for State and Local Quality Award Programs

More than 40 representatives from Baldrige-based state and local programs attended a two-day workshop on July 24–25 at the NIST campus in Gaithersburg, Maryland. The planning committee—Steve Brandt, Mike Langridge, Geri Markley, and Jan Pridgen—developed an agenda using the evaluation results from the 2005 workshop, a survey of state representatives, and discussions at The Quest for Excellence® XVIII state and local business meeting. Four concurrent breakout sessions were provided to participants on designing successful conferences, generating revenue, partnering with others, and streamlining the evaluation process. Presentations also were made to update state and local programs on the Alliance for Performance Excellence and Baldrige Collaborative. The keynote presenter this year was Ken Schnitzer, Chairman and Chief Executive Officer of Park Place Lexus, a 2005 MBNQA Award recipient. The topics and presenters were well received by all those participating.



Three state programs, Michigan, Louisiana, and Texas, were presented with a State and Local Appreciation Award for their roles in encouraging their state award recipients to become involved in the national Baldrige process and to go on to receive the MBNQA. Michigan Quality Leadership was recognized for encouraging Bronson Methodist Hospital, a 2001 and 2005 state recipient of the Michigan Quality Leadership Award. The Texas Foundation was recognized for encouraging Park Place Lexus, a 2003 state recipient; Richland College, a 2005 state recipient; and DynMcDermott Petroleum Operations, whose Big Hill site was a 2005 state recipient of the Texas Award for Performance Excellence. The Louisiana Quality Foundation also was recognized for encouraging DynMcDermott, a 1996, 2001, and 2003 state recipient of the Louisiana Performance Excellence Award.

Next year's state and local workshop will be held in July 2007. For further information, please contact Heather Zeitlin at (301) 975-8274 (heather.zeitlin@nist.gov) or Barbara Fischer at (301) 975-8942 (barbara.fischer@nist.gov).

2006 Improvement Day Held

BNQP hosted its annual Improvement Day on July 26, with 37 attendees sharing ideas and suggestions for BNQP's improvement. Sessions focused on the Criteria for Performance Excellence, with a special focus on Categories 5 and 6, both of which will receive major revisions in the 2007 Criteria. Participants also proposed changes to other Program processes and modifications to accommodate nonprofit organizations. In addition

Update

to the input provided during Improvement Day, supplemental suggestions were obtained through a call for comments via the BNQP Web site. These comments were gathered in advance and supplied to the participants to inform their conversations.

The Baldrige Program would like to take this opportunity to thank Nicheole Amundsen, Kay Kendall, Joe Muzikowski, John Rose, Mike Strong, and John Vinyard for serving as facilitators for the Improvement Day sessions. A thank you also is given to the participants, many of whom traveled great distances to Gaithersburg, Maryland, just for the day. The Program also thanks those who offered suggestions through the call for comments. BNQP is reviewing the recommended suggestions and using them to help drive program improvements during the coming year.

2006 Regional Conferences Planned

The 2006 Regional Conferences will take place on September 21 at the Sheraton Nashua Hotel in Nashua, New Hampshire, and on October 5 at the Hotel Albuquerque at Old Town in Albuquerque, New Mexico. The conferences are being co-sponsored by the Granite State Quality Council, the Vermont Council for Quality, Quality New Mexico, and The Nevada Quality Alliance.

Both conferences will feature plenary session presentations from the senior leaders of the six 2005 Award recipients—Sunny Fresh Foods, DynMcDermott Petroleum Operations, Park Place Lexus, Jenks Public Schools, Richland College, and Bronson Methodist Hospital—as well as concurrent and town hall sessions featuring current and past Baldrige Award recipients. These recipients include Robert Wood Johnson University Hospital at Hamilton; University of Wisconsin-Stout; Operations Management International, Inc. (OMI); Pearl River School District; Baptist Hospital, Inc; Kenneth W. Monfort College of Business; Clarke American Checks, Inc.; Los Alamos National Bank; and Saint Luke's Hospital of Kansas City.

Keep checking the BNQP Web site (www.baldrige.nist.gov/2006_Regionals/Regionals.htm) for the most current information and for linkages to register for the Regional Conferences and to make hotel reservations. The New Hampshire conference is being held as the leaves begin to turn in the northeast and the New Mexico conference is being held the day before the opening of the nine-day Albuquerque International Balloon Fiesta!

Quest for Excellence Conference Proceedings CD-ROM Now Available

This year, each Quest for Excellence XVIII attendee received a conference proceedings CD-ROM set after the conference. The CD-ROM set is now available for purchase (\$1,000) and can be ordered online at www.softconference.com/260424.

The full compilation CD-ROM set includes video footage of the conference plenary sessions, audio of the concurrent sessions, and presenters' slides. It also includes Award recipient information including profiles, application summaries, speaker bios, and Web site links.

An education version CD-ROM set also is available for a discounted rate (\$300). The education version includes presentations of Award recipients from the education sector only (Jenks Public Schools, Richland College, Kenneth W. Monfort College of Business, and Pearl River School District). It includes video footage of plenary sessions, audio of concurrent sessions, and presenters' slides. In addition, it includes education Award recipient information including profiles, application summaries, speaker bios, and Web site links.

How Do You Know?

Are you a high-performing, innovative organization? How do you know? The Baldrige Program asks these and other important questions in the document *Baldrige Asks: How Do You Know?* The document, available for download at www.baldrige.nist.gov/How_Do_You_Know.htm, presents some organizational results for six Award recipients and the rationale for identifying these critical measures for improving their performance.

2006 Case Study Packet Now Available Online

This year's case study features the fictitious Arroyo Fresco Community Health Center, a nonprofit health care organization of 11 service sites that includes eight medical/dental clinics, a women's health center, two school-based clinics, and the operation of two medical and two dental service vans. Examiners and Alumni attending the 2006 Examiner Preparation Course evaluated the Arroyo Fresco Community Health Center Case Study, and their discussions provided many valuable lessons. The case study demonstrates the form and content of a nonprofit, health care application for the MBNQA by providing information requested in the seven Categories of the 2006 Health Care Criteria for Performance Excellence.

Arroyo Fresco Community Health Center's mission is to provide high-quality health care, responsive to the community's diverse cultural and socioeconomic needs, regardless of people's ability to pay. Arroyo Fresco has a very large service area, spanning more than 23,000 square miles and hosting about 400,000 people.

This year's case study writing team was charged with developing a nonprofit, health care organization that had the challenge of balancing its mission to serve patients who cannot pay against tight fiscal conditions that included an increasing percentage of uninsured patients, no growth in federal grant payments for uninsured patients, and cutbacks in Medicaid eligibility at the state level. Arroyo Fresco also had other key strategic challenges: addressing workforce gaps, particularly the need for clinical providers and staff with specific technical skills; addressing the low incidence of prevention and screening and the higher incidence of disease in its service area; providing specialty care and meeting uninsured patients' needs; recruiting and retaining staff; and enhancing relationships with patients, the community, and external partners.

Not all Criteria requirements are fully addressed in the case study. Because the main purpose of the case study is to familiarize Examiners with the Criteria and "real" applications, gaps reflect opportunities for improvement that Examiners could encounter in evaluating an actual Baldrige Award application.

In addition to the Arroyo Fresco Community Health Center Case Study, other publications are posted online as part of the case study packet (<http://www.baldrige.nist.gov/Arroyo.htm>). They include an Arroyo Fresco Executive Summary, Scorebook, and Feedback Report.

The Arroyo Fresco Community Health Center Case Study was written by Kay Kendall (co-team leader), Trish Stoltz (co-team leader), Joe Muzikowski (lead writer), Mark Beiting, Don Lighter, Geri Markley, Julie Mohr, and Sharon Muret-Wagstaff. Rose Almon-Martin, Jim Beckham, Bryan Bushick, Linda Diamond Shapiro, Brenda Kuhn, and Eugene Nelson provided expertise to the team on community health care. A Consensus Team evaluated and scored the Arroyo Fresco Community Health Center application to serve as a baseline for Examiner training. The team (also known as the School Scorebook Team) comprised Denise Haynes (lead), Tricia Edris, Ray Emery, Sherril Gelmon, Patricia Martinez, Kelly Smith, and Michael Stoecklein.

The Baldrige Program thanks these volunteers for the tremendous effort involved in creating these materials and for supporting the Program. We could not conduct such enriching training without you!

Examiner Ambassador Activities

The following Examiners or former Examiners reported outreach efforts between early May and late July: Lori Howard, Karen Smit, Kristin Stehouwer, and Frank Toda.

In addition, the following Examiners (including Alumni and former Examiners) requested the portable exhibit and/or outreach material: George Benson, Harriet Browning, Jon Gray, Paul Grizzell, Barry Johnson, Brian Knight, Tom Mauro, Rebecca Ruhl, Tina Shoemaker, Bob Stearns, Rosemarie Stocky, Mike Strong, John Vinyard, and John Zedick.

Update

BNQP thanks all of these ambassadors for their outreach activities on behalf of the Program. If you have conducted outreach efforts and wish to be recognized, please report your activities to our Outreach and Communications Team via fax at (301) 948-3716 or e-mail at nqp@nist.gov.

Baldrige Office On The Road/Upcoming Conferences

Upcoming events where the Baldrige Program will be exhibiting include the Association of Small Business Development Centers (ASBDC) Conference in Houston, Texas, September 12–15; National Association for Healthcare Quality (NAHQ) Education Conference in San Diego, California, September 17–20; Association for Manufacturing Excellence (AME) Annual Conference in Dallas, Texas, October 17–19; National Quality in Education Conference (NQEC) in Dallas, Texas, November 12–14; and The Institute for Healthcare Improvement (IHI) National Forum on Quality Improvement in Health Care in Orlando, Florida, December 10–13. You can keep track of future events where BNQP will be presenting or exhibiting at www.baldrige.nist.gov/BNQP_Exhibit_Schedule.htm.

Address Changes

To report a change to your address or other contact information, please e-mail Suzana Weaver at suzana.weaver@nist.gov or call her at (301) 975-4219.

NIST News

Every October, in an effort to increase staff learning, Baldrige staff members may rotate from one team to another. Rotation decisions are supervisor-approved and balance staff desires to rotate with what is best for the Baldrige Program overall. On October 1, 2006, one staff member will rotate between teams. Pat Hilton will move from the Examiner and Staff Development Team to the Award Process Team. Pat's contact information (patricia.hilton@nist.gov), [301] 975-2410) will remain the same.

Pamela Wong joined the Publications Management Team as a writer/editor on August 21, 2006. She most recently worked eight years for a public policy organization in Washington, D.C., where she served as editor of a bimonthly, 16-page publication, as well as for Web copy, policy papers, booklets, brochures, conference materials, and so on. Much of her work has focused on the nonprofit sector, including a position with a charitable organization that provides medical supplies and expertise in community development to developing countries.

Pam holds a bachelor's degree in English from the University of Minnesota and a master's degree in communications, with a concentration in print journalism, from Wheaton Graduate School in suburban Chicago.

She can be reached at (301) 975-4504 or at pamela.wong@nist.gov. Welcome, Pamela!

Update

The official newsletter for the Board of Examiners of the Malcolm Baldrige National Quality Award

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